User-Centered Planning

Whether you're designing an application form,
creating a departmental web page,
or implementing a digital solution,
it should all start with the user.

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SUCCESSFUL BUSINESSES meet the needs of their customers by creating products and services that fill an existing or yet-to-be-realized need and by serving up those goods in a convenient way. This customer-centered focus—often referred to in other industries as Design Thinking or User-Based Design—permeates everything in their business, including their mission statement, brand identity, product development, marketing, sales channels, and client interactions.

Businesses that lack a customer-centered focus come and go. Even well-established companies that don't adapt to a changing consumer market will fail. Remember Sears? Early in its history, it was innovative and dominated the retail market for decades. No more.

Like their larger cousins, local governments are created to meet the common needs of their residents (or their customers). They are in the business of promoting the public good and local planning and zoning departments are often (or should be) front and center in that effort. Plans are written, programs established, and land-use regulations adopted to promote the public well-being.

However, many local planning departments struggle to really fulfill their purpose of promoting the public good. Why? Plans and zoning codes tend to be voluminous and are typically hard to decipher, even for staff. Sometimes they are undertaken to fill an institutional need or simply comply with a state mandate. Not surprisingly, these documents and the departments that serve them up aren't fully focused on the residents—their customers.

For far too long, resident-customers have written off their local government's lackluster performance as "well that's government." No longer. Now they are asking for a customer experience that mirrors what they enjoy in the private sector.

Local officials and planners must take notice. The good news is there are steps your department can take to reinvent, reboot, or revise your products and services to become more user-centered, regardless of your budget or current digital presence.

Land-use regulations are a perfect place to start. This is because zoning affects each and every local property owner, not to mention real estate agents, builders, developers, and design professionals working on projects in the community.

"User-centered zoning" is a mindset that permeates every aspect of the zoning code (the product) and the delivery of related services (customer interactions). The framework outlined in the following pages is intended to help planning departments become more user-centered as a strategy to achieve their missions.

This journey starts with—you guessed it—the user.

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A PROCESS FOR BECOMING MORE USER-CENTERED

PHASE 1:

Thinking like an executive at Google or a Main Street retailer, first research your customers and learn about their needs—not just the actual code, plan, or regulation but also how it's delivered. Then identify how you can meet those needs and expectations.

1. IDENTIFY YOUR USERS

Identifying the people that come into contact with zoning regulations is pretty straightforward. But think deeper and identify subgroups—or customer segments. For example, a homeowner seeking to build an accessory dwelling unit is very different from a developer looking to build a multifamily development.

2. EVALUATE THEIR NEEDS AND EXPECTATIONS

Take the time to fully understand your residents' needs and pain points. While some of these may be obvious, don't assume. Ask them. You'll soon realize that each user group, and perhaps segments within the group, have different needs and expectations.

3. BRAINSTORM IDEAS

Whether yours is a department of one or many, make sure everyone is involved in this exercise. Put everything on the table as a possibility. Depending on the setting, this can be done at the staff level or with a planning commission or the governing body.

4. EVALUATE YOUR CAPABILITIES AND BARRIERS

Take stock of what you are able to do. We all operate with limited resources and a few too many roadblocks. Be honest about barriers but also remain open to opportunities.

CUSTOMER TOUCH POINTS

Every interaction with a citizen is a touch point (a point at which a person makes judgments about the city, department, staff, procedures, policies, etc.). Reactions can range from complimentary to indifferent to hostile.

Let's say you mail a public meeting notice to 20 neighbors about a proposed project. Each letter acts as a touch point and will result in a different outcome. For example, some recipients may seek more details but abandon the effort when they have trouble finding the information on your website. Others may toss the notice altogether because it is poorly written or doesn't include the basic facts.

While it's impossible to control every outcome (even Starbucks gets bad reviews), you can set the stage for positive interactions by focusing on residents' needs and expectations.
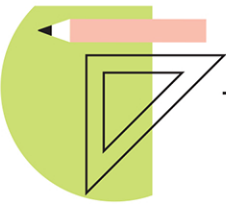
NUDGE IDEAS

• Track the number and type of citizen touch points for a month or two. Share the results with your elected officials as a measurable metric. It may come as a surprise just how many there really are!

• Partner up with a planning department in another city to share resources.

• Although it's tempting, don't jump into a digital solution until your department has a user-centered mission statement that puts residents front and center.

• Start small and pick the low-lying fruit—projects that can be started and completed in short order without a lot of controversy. Little successes build a track record to tackle larger projects.

• Pick projects that are readily visible to residents.

• Prioritize projects that address a pain point for more than one of your user groups.

CUSTOMER PAIN POINT

In the business world, a pain point is a specific problem that a current or prospective client experiences. When applied to a local planning office, pain points can be created when resident-customers are forced to fit bureaucratic systems or outdated service delivery channels.

After your brainstorming session, chances are you will have a long list of things that could be done. Now it's time to organize and prioritize them.

TRY THIS! IN PRACTICE

As you design your work plan, be sure to include testable objectives whenever possible.

For example, let's say you want to rewrite your zoning code. To make it truly user-centered, you must think beyond the generic goal of "writing in plain language" to how you can make citizens' interaction with the code as easy and useful as possible.

Therefore, your new goal might be: "A person should be able to find and submit an application for a home occupation in less than one hour" or "A person should be able to find zoning details about their property in five minutes or less (without calling staff)."

PHASE 3:

You've got a road map to move forward. Now it's time to implement!

5. DEVISE YOUR WORK PLAN

The framework to the right will help you map your ideas according to the type of deliverable and the level of effort required. Your to-do list may have more or fewer items and different groupings. That's okay. These are just some examples to help get you started.

5A. THE CODE (OR PLAN)
Consider what it says and how it says it. Both are equally important.

5B. ELEMENTS OF SERVICE DELIVERY
These areas make up the user experience. To achieve desired outcomes, you need to be strategic about how you interact with citizens (and vice versa).

6. EXECUTE YOUR PLAN

Your entire plan may take a long time to fully implement. That's okay. Starting is often the most difficult part. Start with one project and don't waver from your commitment to move the needle. To help get you started, check out codeforamerica.org for a list of tools and best practices.

TRY THIS! IN PRACTICE

Before you dig into Step 5, consider adopting a user-centered mission statement.

For example:
The zoning code should achieve the city's future-oriented development goals and also make sense to members of the public with little to no planning or development experience.
or
Administration of the zoning code from end to end should be easy and accessible for everyone.

		THE CODE (OR PLAN)	PEOPLE	IN- AND OUTBOUND COMMUNICATIONS	INTERNAL SYSTEMS AND POLICIES	PUBLIC INPUT— ENGAGEMENT	TRANSACTIONAL
		Any good writer knows their audience and writes accordingly. The trick is to organize the content well and speak clearly. This is really hard work but well worth the effort.	This category includes each and every staff member, the plan commission, and elected officials.	Two-way communication is critical and includes effective strategies and channels for sharing information with residents and obtaining resident feedback.	Look at the entire workings of the department, including any unwritten procedures and policies.	Take a holistic view of how the public is involved in the zoning process, including "involuntary" participants like neighbors.	Transactions can range from someone looking for information to navigating the review process or providing neighborhood feedback on a pending project.
LEVEL OF EFFORT	REVISE	• Adopt minor code amendments to clear up any internal conflicts and/or unanswered questions.	• Add "customer effectiveness" to employee reviews to establish a formal structure for accountability.	• Add a comment form to your website. • Create how-to or FAQ resources. • Revise the format of staff reports for pending applications for easy reading.	• Let applicants and the general public know upfront what criteria will be used in evaluating an application.	• Have plans and materials translated for your community's non-English-speaking residents.	• Accept online payments. • Allow for submission of application forms online.
	REBOOT	• Streamline procedures in the code by removing any unnecessary or cumbersome steps. • Add the "why" into each item in the code to help users understand what the city is trying to accomplish.	• Adopt a customer-first attitude and mission statement. • Train yourself and your staff to always be aware of what your messaging is saying and how it comes across to others.	• Send out proactive press releases and/or tweets to keep users engaged. • Create a regular video or podcast, like a quarterly "from the planning director" message, to help build your brand.	• Revise your application forms to be as short and simple as possible.	• Conduct online public meetings to make them more accessible to the public.	• Go paperless with online forms.
	REINVENT	• Rewrite the entire code to fully align with your user-based mission statement.	• Change the name of the department. • Hire more staff. • Create an ombudsman position to help resolve disputes. • Keep the office open "after hours" to increase accessibility.	• Add chatbots or live chat functionality to department's website to create opportunities for positive real-time interactions.	• Give staff more decision-making authority to expedite development reviews.	• Implement an online citizen engagement platform to improve two-way communication. • Create public-facing ArcGIS StoryMaps to tell a compelling story about your department's work.	• Implement an enterprise-wide online permitting platform to make the development review process easier for everyone, including staff.

7. EVALUATE AND TWEAK

Once you've rolled out one of your projects, be sure to evaluate whether it hits the mark. Take the time to tweak or revise until it's just right. While it may be difficult to do, estimate the return on investment. "We spent X to produce Y."

8. SHOW AND TELL

Don't assume everyone will know the great work you've accomplished. Tell and retell your story with targeted messages to your residents, elected officials, planning commissioners, and others. Take charge of your brand identity and promote it proactively. ■
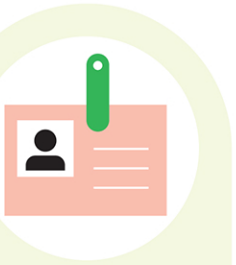
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